

CHECKLIST FOR CLOSING AN INFORMAL ESTATE ADMINISTRATION

TO CLOSE AN ESTATE	
	Affidavit of Service (Probate) (PR-1817) <ul style="list-style-type: none"> • Showing that a copy of Will/Application/Notice was mailed to all interested persons who have not signed a Waiver and Consent (PR-1803). • Showing that a copy of the Inventory was mailed to all interested persons. • Showing that a copy of the Estate Account was mailed to all interested persons.
	Proof of Publication (Obtained from newspaper where the Notice was published.)
	Inventory (with schedules) (PR-1811) Fee Required - .2% of net assets for estates opened after September 1, 2001. Due within 6 months from date Personal Representative is appointed unless time to file has been shortened per local practice.
	Final Estate Account (Informal and Formal Administration) with schedules (PR-1814)
	Estate Receipt (PR-1815) <ul style="list-style-type: none"> • Each distributee must provide a receipt for all distributions received. • Receipts can also be used to demonstrate that claims have been paid in full and satisfied.
	Closing Certificate for Fiduciaries (Obtained from the State of Wisconsin after filing a Fiduciary Tax Return and/or Schedule CC)
	Statement of Personal Representative to Close Estate (Informal Administration) (PR-1816)